



High-Profile Information Technology Project Status Report

Department:	Employee Trust Funds		
Project Name:	Transformation, Integration, Modernization (TIM) – Benefit Administration System (BAS)		
Business Sponsor:	Robert Conlin		
Date of Report:	3/15/18	Reporting for Quarter:	3/1/2018
Project Start Date:	March, 2014	Planned Implementation Date:	2019
Estimated Project Cost:	\$28.5M	Amount Provided Through Master Lease:	\$5M - paid off

Project Description – Enter a brief description of the project, including the business case for it and its major deliverables.

ETF is replacing all of its legacy, custom-built line-of-business computer applications with a single, highly-integrated system from Vitech Systems Group. Vitech's V3 application is already installed at over 20 public pension funds and 30 private sector companies. It is a functioning and highly configurable system specifically designed for pension, insurance and other benefits administration.

The Benefit Administration System (BAS) project will deliver functionality in three rollouts, or phases:

Rollout 1 - Imaging, workflow, and document management - Q4, 2015 - DONE

Rollout 2 - Employer Reporting - Q1, 2019

Rollout 2.5 - Insurance Benefits - Q2-3, 2019

Rollout 3 - Employee Benefit Processing 2020 (estimate) -- WILL BE DELAYED DUE TO R2 DELAY

Project Funding – Please describe all sources of funding for the project, which should add up to the estimated project cost cited above.

The Project funding has been made available through Department's SEG funds and via separate budget request for project staffing and funds made available through the department's SEG funds, and through funding advanced through Master Lease as needed -- which is now paid off. Vitech's V3 BAS is a purchased system that requires extensive configuration and some customization. Major technologies are Java and Oracle Database. Most of the functionality is proprietary to Vitech.

Project Status – Determine the status for the Schedule and Budget categories below based on the guidelines on the right and described in more detail on page 2 of this document.

Insert an X in the column that best describes the status of the category. Add comments for that category as needed.

Additional comments are not required if the status is Green, but if a category has a status of Yellow or Red, describe the issues or problems and what actions the agency is taking to address them.

STATUS COLOR INDICATORS	
Green	On target as planned
Yellow	Encountering issues (e.g., Schedule or Budget over by 10% to 25%)
Red	Encountering problems (e.g., Schedule or Budget over by 25% or more)

Project Status Categories

	Green	Yellow	Red
Schedule Status After postponing R2, we are now working on a new product assessment schedule. There are three iterations and a readiness assessment. The first iteration was just received in early March. The second iteration is scheduled on 4/9/2018 and the third is 5/21/2018. The readiness assessment for determining go-live starts on 7/2/2018. R2 -- as currently scoped -- includes employer reporting, which is targeted for go-live on 1/1/2019. R2.5 includes insurance benefits and is currently targeted for sometime after annual reconciliation in mid-2019. The data integrity portion of the project remains on-track.	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Budget Status	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

The contract with Vitech is a fixed cost project. After delays and budget updates, the project is still within the original budget of \$32.5M for the vendor portion of the project. ETF paid off the full master lease sooner than scheduled. Given the postponement of R2 from 1/1/2018 to 1/1/2019 for employer reporting, and sometime in mid-2019 for insurance benefits, it is not yet known if there will be any additional vendor costs.

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Summarize Any Completed Major Tasks or Project Phases:

Rollout 1 went successfully live on November 9, 2015. Rollout 1.5, which includes many bug fixes and an architectural framework upgrade, went live on October 10, 2016. After a few high priority bug fix releases, ETF discontinued any additional Rollout 1 or 1.5-related releases to focus fully on Rollout 2.

ETF completed the scope work required for SDD's (system design documents) for R2. The project is now focused on the three R2 iteration assessments to validate the completeness and quality of the Vitech product functionality as it relates to the scope of R2.

Summarize Any Significant Project Changes Affecting Schedule, Budget or Scope:

For each change, describe what the change involved, when it was approved, and the reasons behind the approved change. Vitech's delivery of product functionality is behind schedule as noted above. Due to the complexity of the project and Vitech's inability to deliver the required business functionality, non-functional (security, performance, etc.) requirements and a quality product, among other things, ETF is working with Vitech to phase the R2 implementation in 2019. In working with Vitech, we are targeting to have the employer reporting in place in early 2019 and the insurance benefits functionality production-ready in mid-2019.

Additional Comments or Issues (optional):

If you have any additional overall status comments about the project (e.g., project news, accomplishments, emerging challenges or risks that could affect the project), please provide them here.

ETF continues to work with our 3rd party OPM to perform a detailed IV&V. This includes Vitech as a vendor, ETF's practices and other aspects of the BAS project and subproject. This work has begun. It is important that we can validate and verify the viability of Vitech as a vendor and their ability to deliver on a project of this magnitude.

Project Status Category Guidelines

Schedule Status

Green – Indicates that the project or phase is on track for the targeted implementation date.

Project Status Category Guidelines
<p>Yellow – Indicates that the project or phase <u>may be falling behind</u> and analysis needs to be done to determine if the project can recover and still achieve the targeted implementation date, or if adjustments must be made to that date.</p> <p>Red – Indicates that the project or critical tasks <u>have fallen behind</u> schedule, and corrective action must be taken to still achieve the targeted implementation date or that date must be changed.</p>
<p>Budget Status</p> <p>Green – Currently on target with project budget.</p> <p>Yellow – Project is over budget by 10 to 25%.</p> <p>Red – Project is over budget by 25% or more.</p>